



Enterprise Information Portal

## iQuery User's Manual

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## Preface

### Who Are You?

This manual is intended for members of the hospitality staff (a.k.a. F&B staff) who are charged with retrieving specific information from the restaurant's enterprise database on *mymicros.net*. The manual is written for persons who are familiar with:

Restaurant industry concepts	<i>What is food cost?</i>
POS concepts	<i>What Is a major group?</i>
POS database(s)	<i>MICROS 3700, 8700, 9700, e7, Symphony</i>
Your enterprise's database design	<i>How are our menu items organized?</i>
Your enterprise's locations structure	<i>Which restaurants are included in each district?</i>
Your enterprise's org chart	<i>Who are the district managers, and what is their role?</i>
mymicros.net	<i>Can you launch an Employee Sales report, and drill down?</i>

### What can be learned?

This manual contains the following information:

What is iQuery?	<i>How does it work?</i>
iQuery Concepts	<i>What are the basic tasks, navigational elements, etc.?</i>
How-to	<i>How do I select, save, and run a query?</i>



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## **Before You Begin**

### ***What is iQuery?***

iQuery is a data mining tool that allows users to query the mymicros.net database.

iQuery installs as a plug-in on the Microsoft Excel® toolbar. Users can create a query, insert the results in an Excel worksheet, and format and manipulate the data as needed. The query can also be saved to mymicros.net as a report.

Designed for the hospitality staff, not the IT staff, iQuery gives users the ability to create custom reports using a simple, intuitive interface.



## Install iQuery

### Requirements

iQuery requires the .NET Framework version 1.1, a component of the Microsoft Windows<sup>®</sup> operating system that is used to run Windows-based applications. Microsoft provides instructions to confirm that you have the .NET Framework installed, and instructions to download and install it if you do not. Refer to <http://msdn.microsoft.com/netframework/technologyinfo/howtoget/default.aspx>.

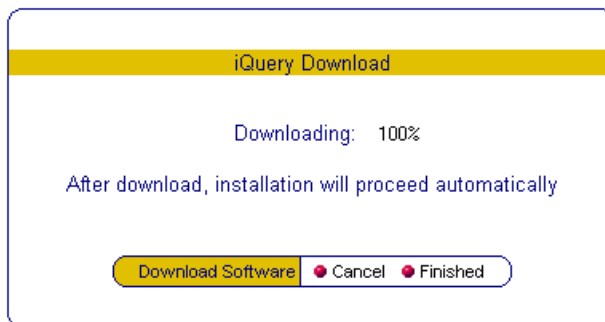
### Installation

The iQuery plug-in is installed from the mymicros.net Enterprise Information Portal. If your role's security privileges permit, the iQuery Install link displays on the side menu.



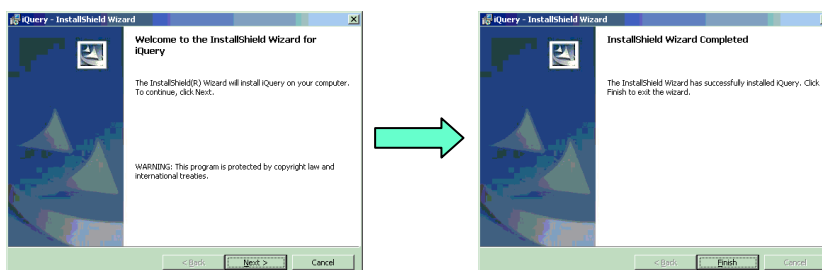
To install the plug-in,

1. Close Microsoft Excel<sup>®</sup>, if it is open on your PC.
2. Click on the install link. The download screen displays:



After the software downloads, the Installshield Wizard launches.

3. Click Next on the Installshield screen. The plug-in installs automatically.

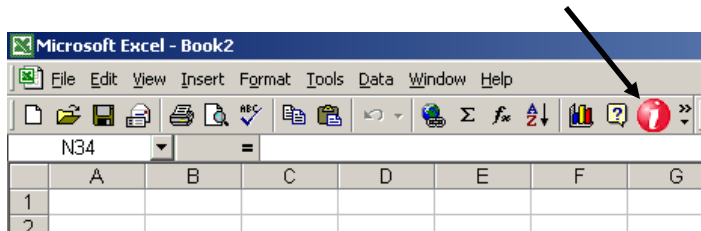




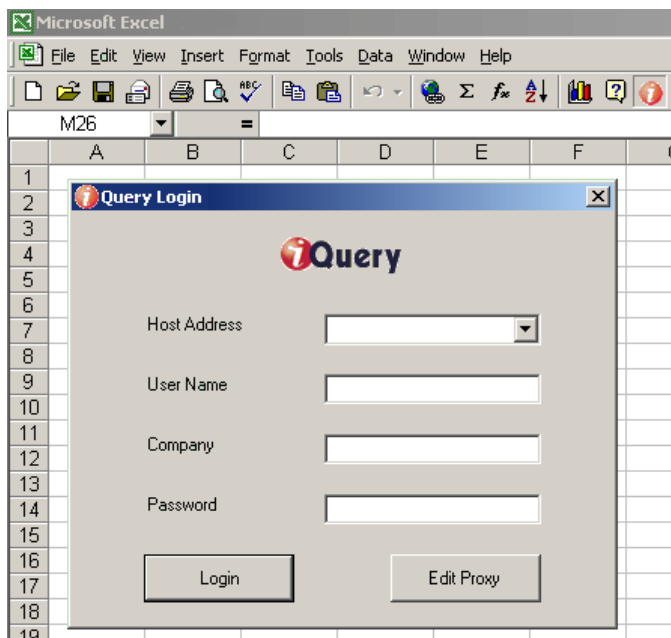
## Log in

To log in to iQuery,

1. Launch Microsoft Excel®. The iQuery plug-in displays as a tool on the Excel menu.



2. Click the iQuery tool. The Login screen displays.



3. Enter the User Name, Company, and Password that you use to login to mymicros.net, and click Login.

The Host Address field should populate automatically, and you should not need to edit the proxy settings. If you have questions regarding these fields, consult your System Administrator.

The iQuery form displays.



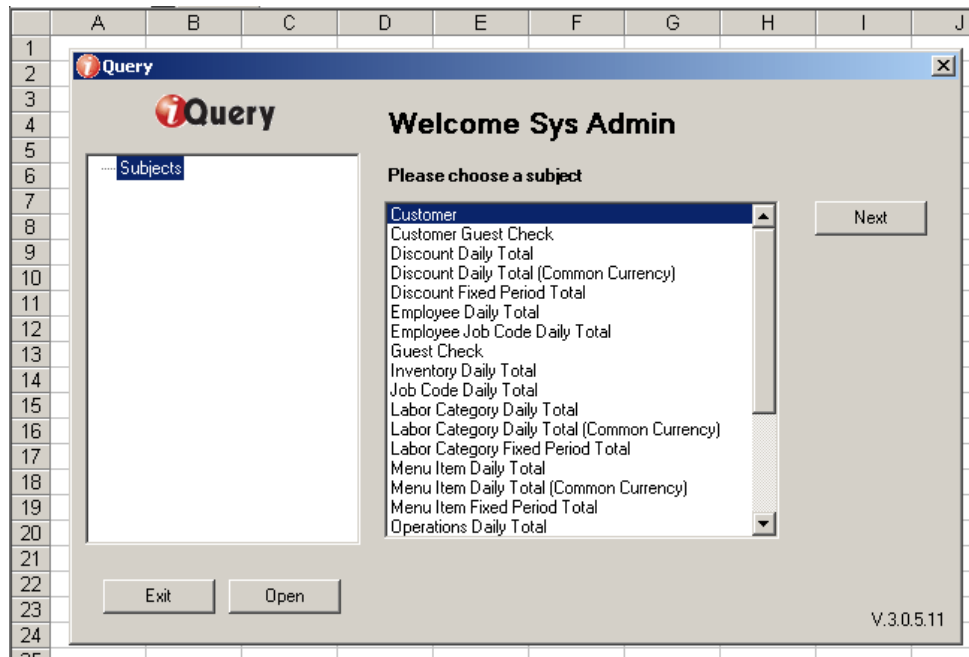
## Select and Filter Data

To build a query, follow the steps in this chapter.

### Subject

A subject is the topic or content of the query.

1. Select a subject area from the iQuery form. Use the scroll bar to navigate the list.



A list of columns displays for your selected subject.

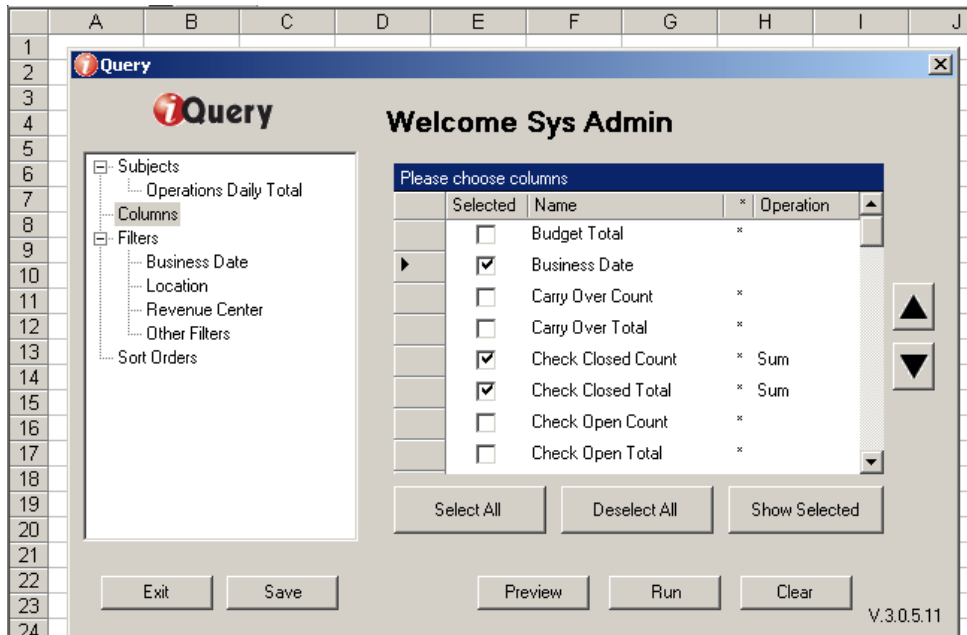


## Columns

Columns are the contents that are available for the selected subject.

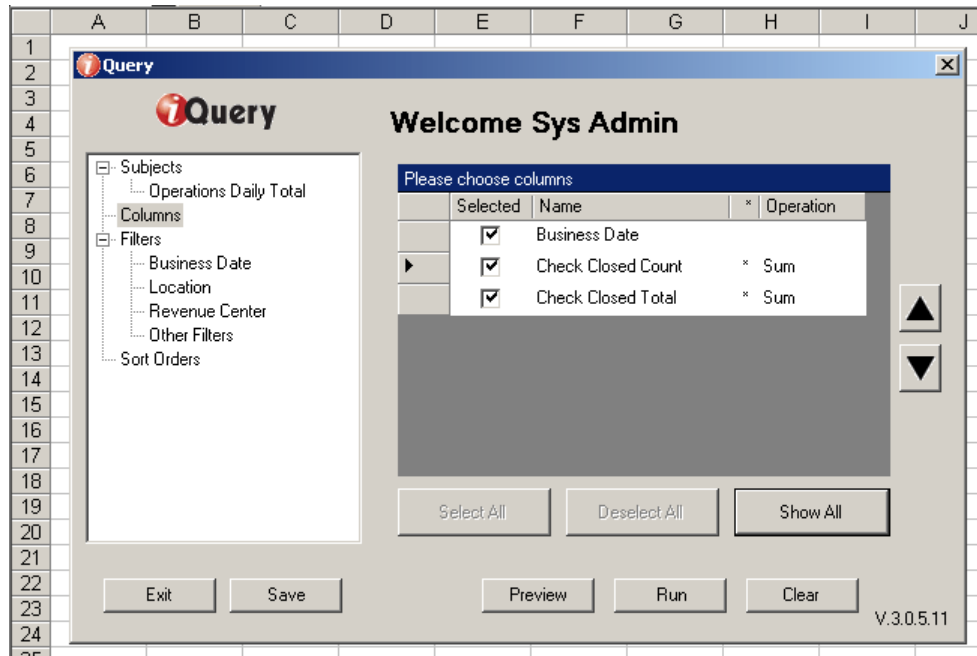
The number and types of filters available differ, depending on the subject area that was selected.

2. Select the columns that you wish to be brought to the Excel spreadsheet. Use the arrow scroll bar to navigate the list. Use the arrow keys to change the order in which columns occur. The item at the top of the list will display in the first column of the spreadsheet.



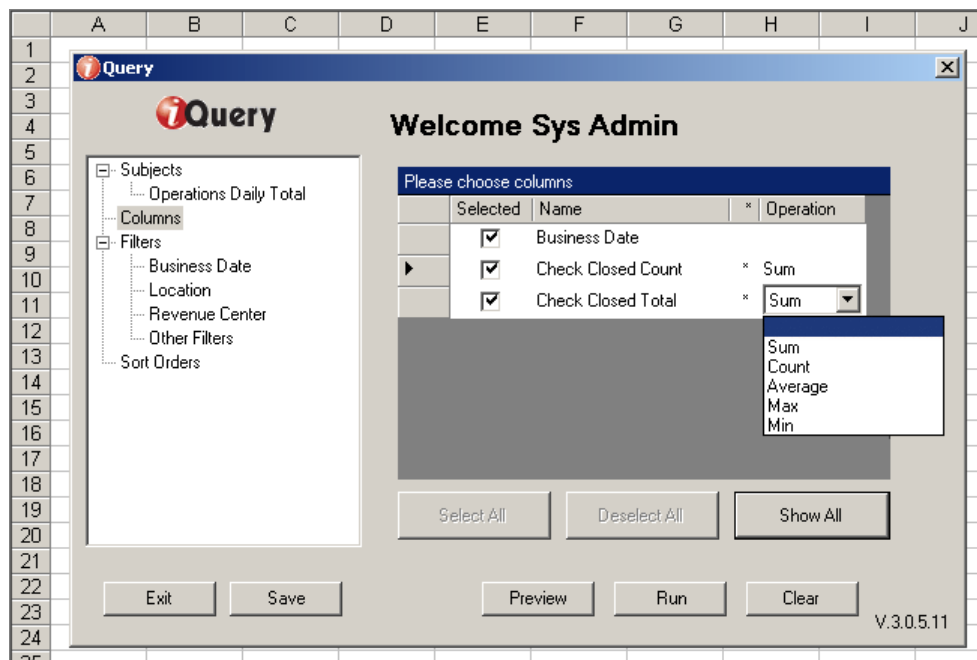


- Click Show Selected to hide columns that were not selected for this query. The arrow keys cannot be used to change the order of the columns when Show Selected is in use.



Some selections allow you to perform an arithmetic or statistical operation on the column that will be brought into Excel. These selections are marked with an asterisk (\*).

- Select the operation to perform on specific columns. Depending on the type of data in the column, you may be able to select a sum, item count, average, etc.





## Filters

Filters are specifications for further defining the query. They provide the ability to more quickly locate the needed information.

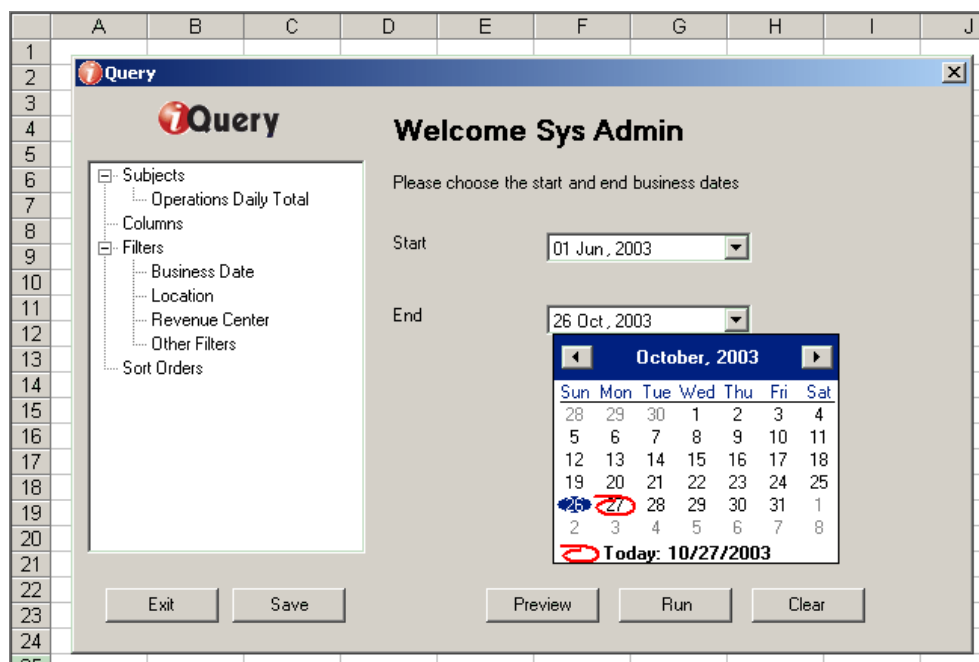
After selecting specific columns to be included in the query, filter the data that will be brought into the Excel spreadsheet. The number and types of filters available differ, depending on the subject area that was selected.

Example: Typical filter options available for...

menu items	tenders, discounts, service charges	guest checks
<ul style="list-style-type: none"> <li>Filters           <ul style="list-style-type: none"> <li>Business Date</li> <li>Category Group 1</li> <li>Category Group 2</li> <li>Category Group 3</li> <li>Category Group 4</li> <li>Family Group</li> <li>Location</li> <li>Major Group</li> <li>Order Type</li> <li>Revenue Center</li> <li>Other Filters</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Filters           <ul style="list-style-type: none"> <li>Business Date</li> <li>Category Group 1</li> <li>Category Group 2</li> <li>Category Group 3</li> <li>Category Group 4</li> <li>Fixed Period / Business Hour</li> <li>Location</li> <li>Order Type</li> <li>Revenue Center</li> <li>Other Filters</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Filters           <ul style="list-style-type: none"> <li>Close Business Date</li> <li>Close Fixed Period / Business</li> <li>Location</li> <li>Open Business Date</li> <li>Open Fixed Period / Business</li> <li>Order Type</li> <li>Revenue Center</li> <li>Other Filters</li> </ul> </li> </ul>

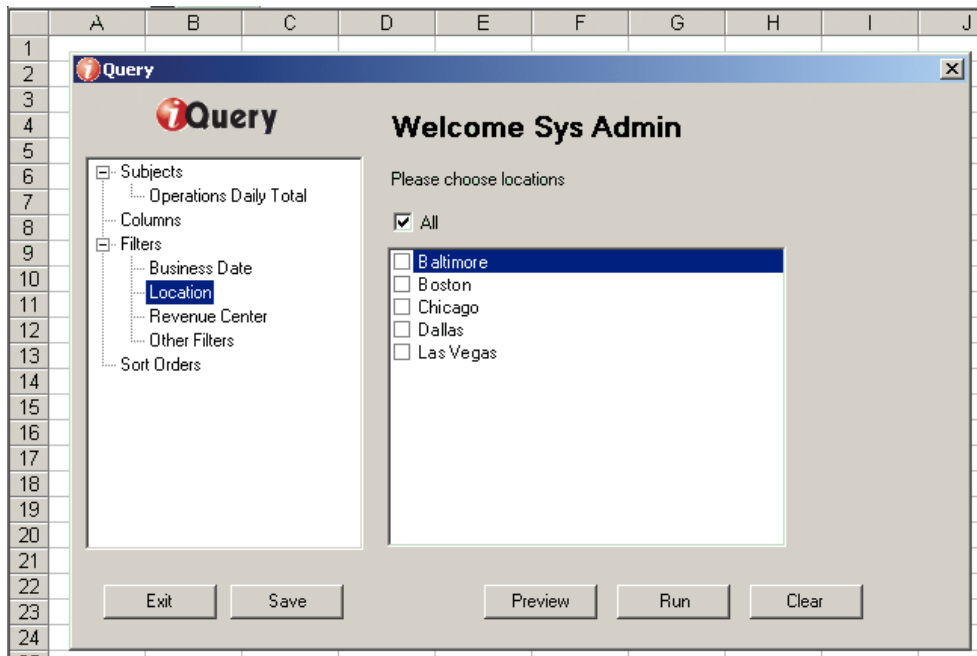
The examples on these pages describe the basic filter selection available for most subjects.

5. Select a specific business date, or a range of dates.

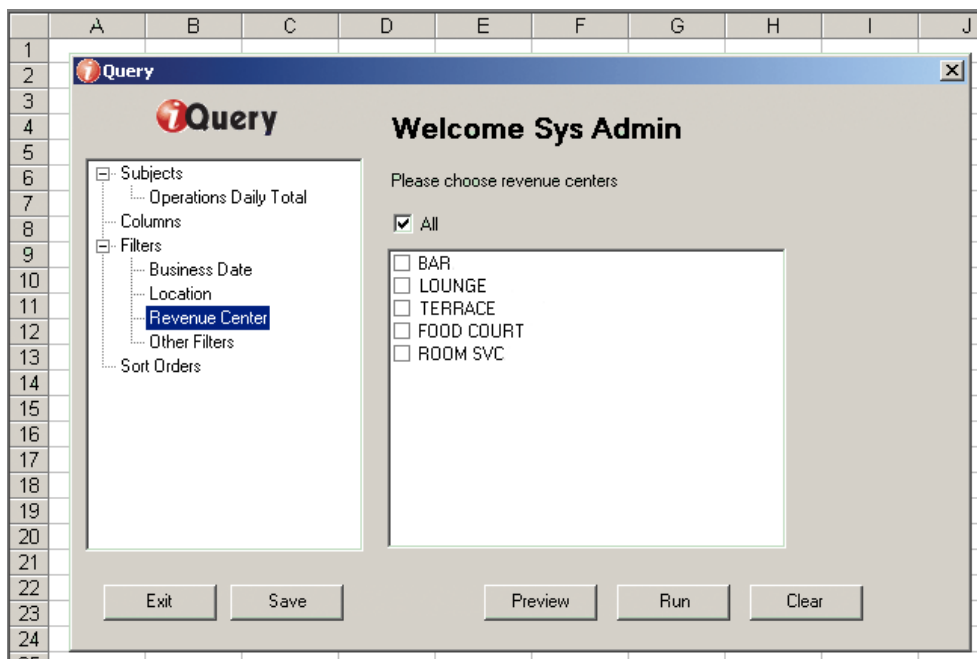




6. Select one or more locations in the enterprise.



7. Select one or more revenue centers for the locations.





8. Select additional filters for your data.

The screenshot shows the iQuery application window titled 'Welcome Sys Admin'. On the left is a tree view with 'Subjects' (Operations Daily Total), 'Columns', 'Filters', and 'Sort Orders'. The 'Filters' section is expanded. The main area is titled 'Filter the data to specify which rows to include'. It contains two filter rules. The first rule is 'Low Temperature' equals '50'. The second rule is 'Dining Time' is less than '45'. There are radio buttons for 'And' and 'Or' between the rules. At the bottom are buttons for 'Exit', 'Save', 'Run', and 'Clear'. A dropdown menu is open, showing a list of filter options: 'Check Closed Count', 'Check Closed Total', 'Check Open Count', 'Check Open Total', 'Check Transfer-in Co', 'Check Transfer-in To', and 'Check Transfer-out C'.

## Sort Order

9. Select the order in which you want the data sorted. Like Excel, iQuery allows you to sort on three different columns of data.

The screenshot shows the iQuery application window titled 'Welcome Sys Admin'. On the left is a tree view with 'Subjects' (Operations Daily Total), 'Columns', 'Filters', and 'Sort Orders'. The 'Sort Orders' section is expanded. The main area is titled 'Specify how you want your data sorted'. It contains three sort criteria. The first is 'Sort by' 'Check Open Total' with 'Ascending' selected. The second is 'Then by' 'Number of Guests' with 'Ascending' selected. The third is 'Then by' with a dropdown menu open showing a list of sort options: 'Check Closed Total', 'Check Open Count', 'Check Open Total', 'Check Closed Count', 'Grand Total', and 'Number of Guests'. At the bottom are buttons for 'Exit', 'Save', and 'Clear'.



## Preview the Results

After you select and filter the data that you want included in your query, you can preview the results by clicking Preview.

<

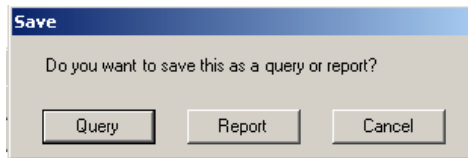
Previewing lets you confirm—before going any further—that the query you constructed returns the desired results. For example, if there are no results returned, or if the results include an unmanageable number of rows, then you can change the query selections to refine the results.



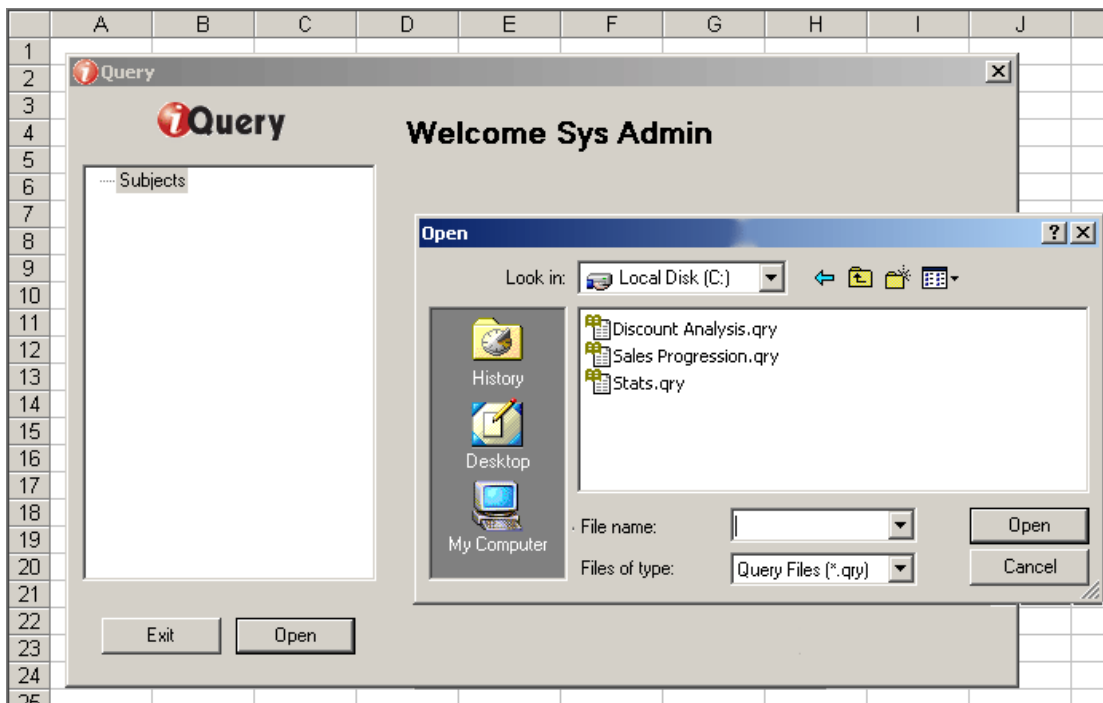
## Save

After you have previewed your query to confirm that it returns the results you want, you can save it for future use. Click Save.

The application prompts you to save the query, or save the report.



## Save as a Query

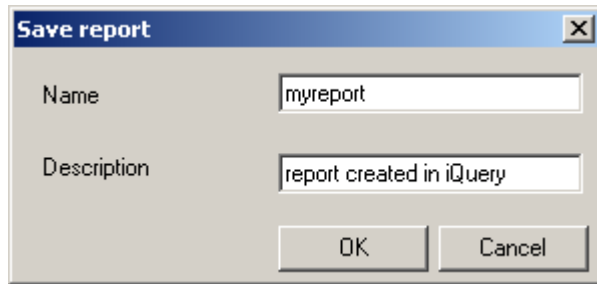


Select **Query** if you want to be able to open this query in Microsoft Excel at some point in the future. All of the selections you made will be saved, *except* for the business date (it is unlikely you'll want to run this query over and over again for the same date.)

A query is saved to your local hard disk.



## ***Save as a Report***

A screenshot of a 'Save report' dialog box. The dialog has a title bar with the text 'Save report' and a close button (X). Inside, there are two text input fields. The first is labeled 'Name' and contains the text 'myreport'. The second is labeled 'Description' and contains the text 'report created in iQuery'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

Select **Report** if you want to be able to run this query as a report from within the mymicros.net Enterprise Information Portal. All of the selections you made will be saved, *except* for the business date (it is unlikely you'll want to run this query over and over again for the same date.)

A query is saved to the hard disk of mymicros.net hosting server.

Users must be members of a privileged role in order to save a report, and must be privileged to open and launch that report in the portal.



## Run the Current Query

Before running a query, you should:

- Preview the query, to confirm that the data it returns is what you need.
- Save the query (if desired) so that it can be used again.

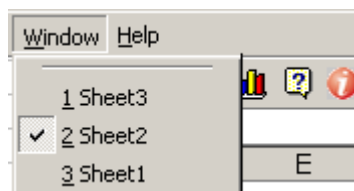
To transfer the results of your query into the Microsoft Excel® worksheet, click Run. The iQuery selection form clears, and the results from this query are entered into the worksheet.

	A	B	C	D	E	
1	Check Closed Count (Sum)	Check Closed Total (Sum)	Check Open Count (Sum)	Check Open Total (Sum)	Grand Total (Sum)	Net Sales
2	324	4875.65	327	4935.87	5231.75	
3	94	1379.97	94	1379.97	0	
4	185	62532.11	185	62532.11	0	
5	7984	69493.3	7984	69493.3	0	
6	272	23486.91	272	23486.91	0	
7	1298	22056.63	1298	22056.63	0	
8	1927	92379.56	1927	92379.56	0	
9	5	3493.24	5	3493.24	0	
10	1061	30676.75	1060	30616.53	33052.29	
11	133	3054.64	133	3054.64	0	
12						
13						
14						

You can now use Microsoft Excel to format and manipulate this data to provide necessary information.

	A	B	C	D	E	F	G	H	I	J
1	Check Closed Count (Sum)	Check Closed Total (Sum)	Check Open Count (Sum)	Check Open Total (Sum)	Grand Total (Sum)	Net Sales Total (Sum)	Non Tax Sales Ttl (Sum)	Number of Checks (Sum)	Number of Guests (Sum)	
2	324	\$4,875.65	327	\$4,935.87	\$5,231.75	\$4,279.90		\$327.00	280	
3	94	\$1,379.97	94	\$1,379.97		\$1,320.95	\$15,501.95	\$94.00	120	
4	185	\$62,532.11	185	\$62,532.11		\$54,632.05	\$54,628.08	\$185.00	1,735	
5	7,984	\$69,493.30	7,984	\$69,493.30		\$66,716.76	\$67,835.03	\$7,984.00	5,795	
6	272	\$23,486.91	272	\$23,486.91		\$20,424.11	\$23,739.08	\$272.00	649	
7	1,298	\$22,056.63	1,298	\$22,056.63		\$19,933.90	\$20,851.70	\$1,298.00	1,988	
8	1,927	\$92,379.56	1,927	\$92,379.56		\$79,688.73	\$84,634.70	\$1,927.00	4,298	
9	5	\$3,493.24	5	\$3,493.24		\$2,916.30	\$2,916.30	\$5.00	155	
10	1,061	\$30,676.75	1,060	\$30,616.53	\$33,052.29	\$26,454.26		\$1,060.00	2,220	
11	133	\$3,054.64	133	\$3,054.64		\$2,355.82	\$16,011.20	\$133.00	172	
12										
13										

If you run a new query, iQuery will automatically open a new worksheet to receive the data it returns. This prevents the data in the current worksheet from being overwritten by the results of a new query.

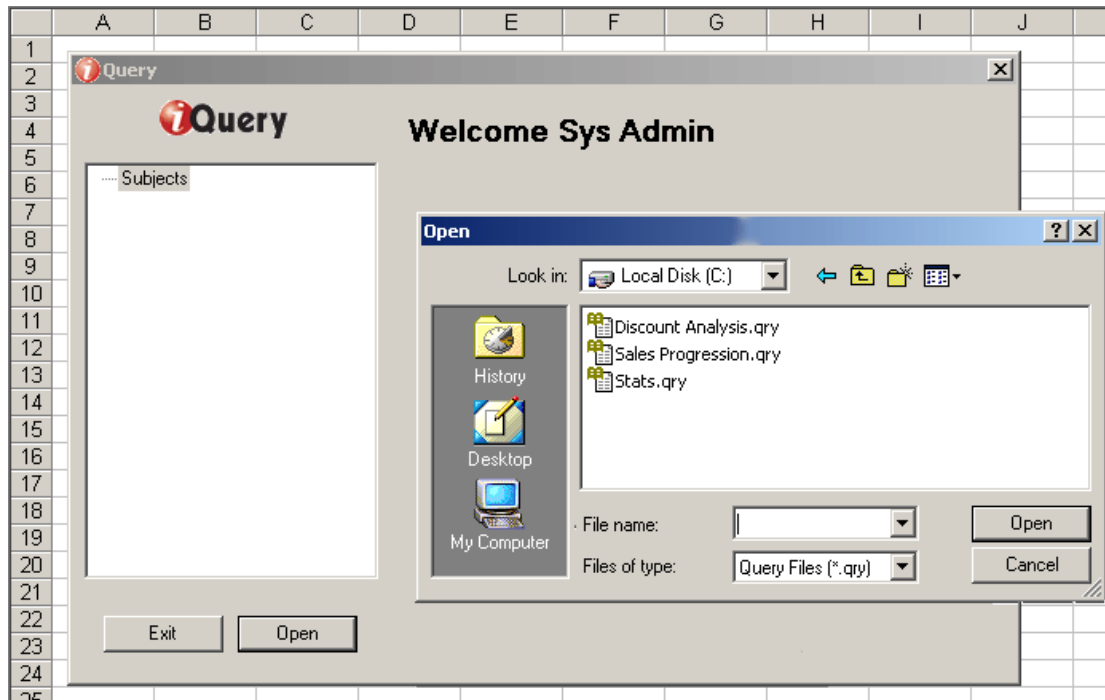


To run a new query, click the iQuery plug-in and log in again.



## Open a Saved Query

Queries that have been saved to the local hard drive can be opened and run whenever necessary.



After opening a saved query, you must select a business date or date range before running the query.

This option also allows the user to delete queries that are no longer needed.



## Launch a Saved Report

Reports that have been saved can be launched from mymicros.net. The user must be a member of a role that can launch custom reports.

1. Log in to the portal.
2. Select More Reports from the side menu.
3. Select Custom Reports from the list.
4. Select the report you wish to run.

**Reports**

Name	Description
Custom myreport	User-defined and iQuery reports report created in iQuery

The report you created in iQuery displays as a mymicros.net report.

**myreport**

Check Closed Count	Closed Check Total	Check Open Count	Check Open Total	Grand Total	Net Sales Total	Non Taxable Total	Number Checks	Number Guests
780	15,465.56	780	15,465.56	16,389.36	13,699.07	0.00	780	1,520